

A Snapshot of Colorado's Thriving Food & Ag Industry



Colorado's Agriculture Industry

- ✓ Colorado's farmers and ranchers ...
 - Help feed the nation, as well as consumers around the world,
 - Provide wildlife habitat and protect the environment, and
 - Support Colorado's rural communities.
- ✓ Agriculture used to be thought of as food, fiber, and feed. Today, it's also about fuel as rural landowners are increasingly engaged in new energy development and about fun with agritourism presenting farmers and ranchers unique opportunities for increased revenues.
- ✓ Colorado's diverse agricultural and food industry contributes significantly to the state's economy – generating economic activity of more than \$40 billion annually.
- ✓ Supports more than 170,000 jobs.

Marijuana Contribution?

Industrial Hemp



Recreational Marijuana





Cattle Run the Show

Colorado's Top 10

Rank	Product(s)	2012 Cash Receipts (Million \$)
#1	Cattle & Calves	\$3,663
#2	Corn for Grain	\$939
#3	Dairy	\$594
#4	Wheat	\$532
#5	Hay	\$462
#6	Greenhouse & Nursery	\$253
#7	Hogs	\$225
#8	Potatoes	\$180
#9	Other Livestock (including sheep & lambs)	\$152
#10	Poultry & Eggs	\$106
The Top 10 account for 93% of total cash receipts!		\$7,106





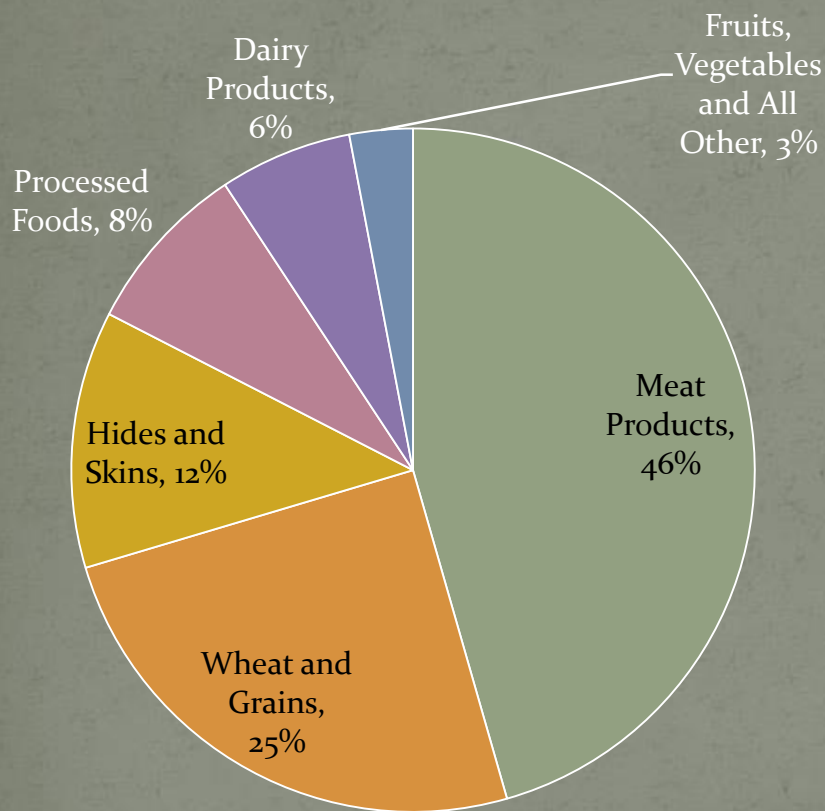
Farm & Ranch Income

- ✓ Colorado net farm income for 2014 is estimated at \$2.6 billion – almost double that of 2013.
- ✓ Record-high cattle prices and lower feed costs created greater than expected profitability throughout the beef complex.
- ✓ Looking ahead to 2015, net income will remain at about \$2.6 billion.
- ✓ Favorable fall moisture for winter wheat

Colorado Total Net Farm Income



Food & Ag Products Exported in 2013

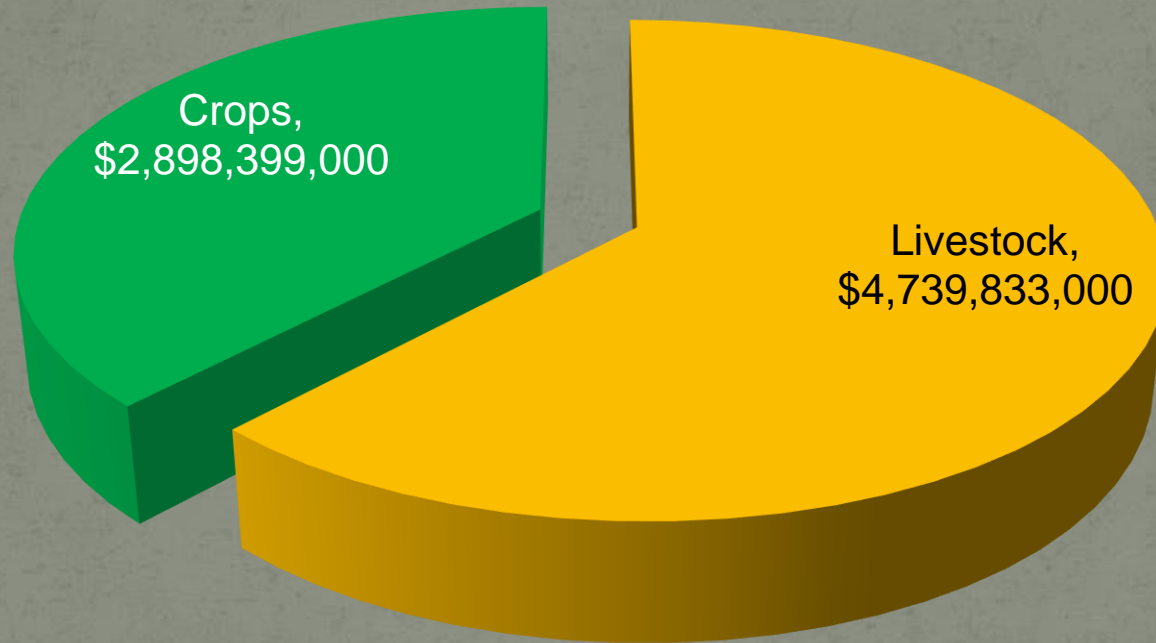


- ✓ Livestock complex (i.e., meat products, hides and skins, genetics, and live animals) accounts for nearly 60% of total food and ag exports.
- ✓ Dairy product and processed food exports have gained share in recent years.



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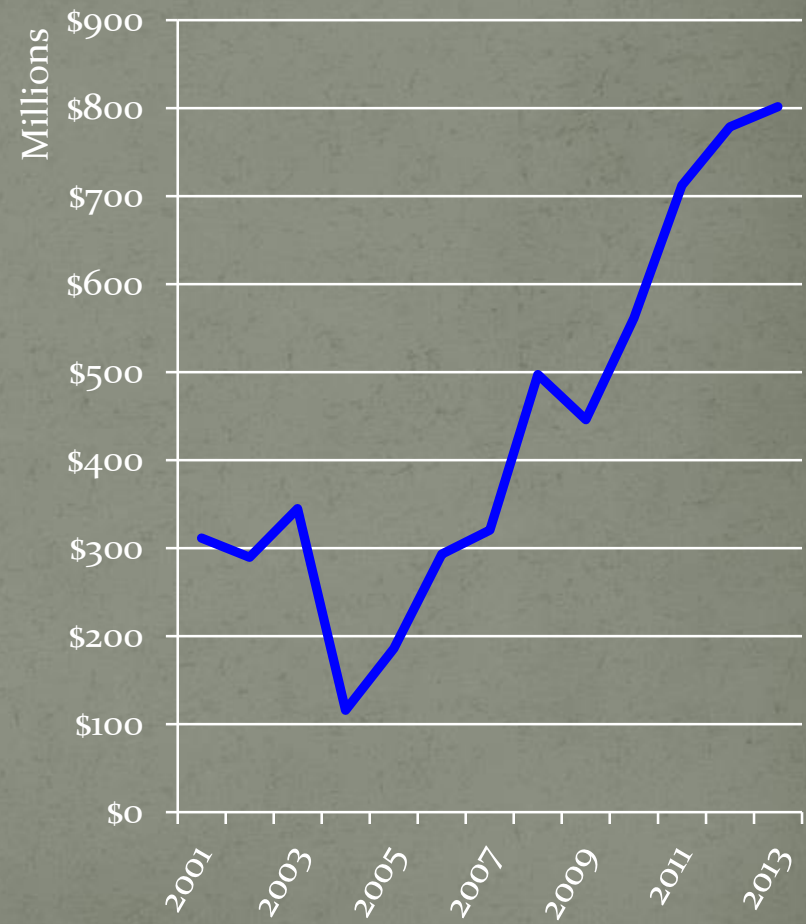
2012 Colorado Farm & Ranch Cash Receipts



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Colorado Beef & BVM Exports

- ✓ Beef and BVM exports account for 40% of Colorado food and ag exports!
- ✓ Colorado ranks 4th among all states in beef and BVM exports.
- ✓ Record high U.S. beef prices have potential to curb continued growth.



How do we support so many cattle?
..... A Vast Rangeland Resource



Ag Partners for Species Conservation



YTD Food & Ag Exports

- ✓ Up 13% for Jan-Sept 2014 as compared to same period for 2013.
 - 11% increase in beef and BVM exports
 - 14% increase in hides and skins exports
 - 87% increase in sunflower seeds exports
 - Beer exports up from \$2.3 million to \$23.2 million
 - Millet exports up from \$2.5 million to \$14.4 million
 - Direct exports of wheat up from \$0 to \$17 million

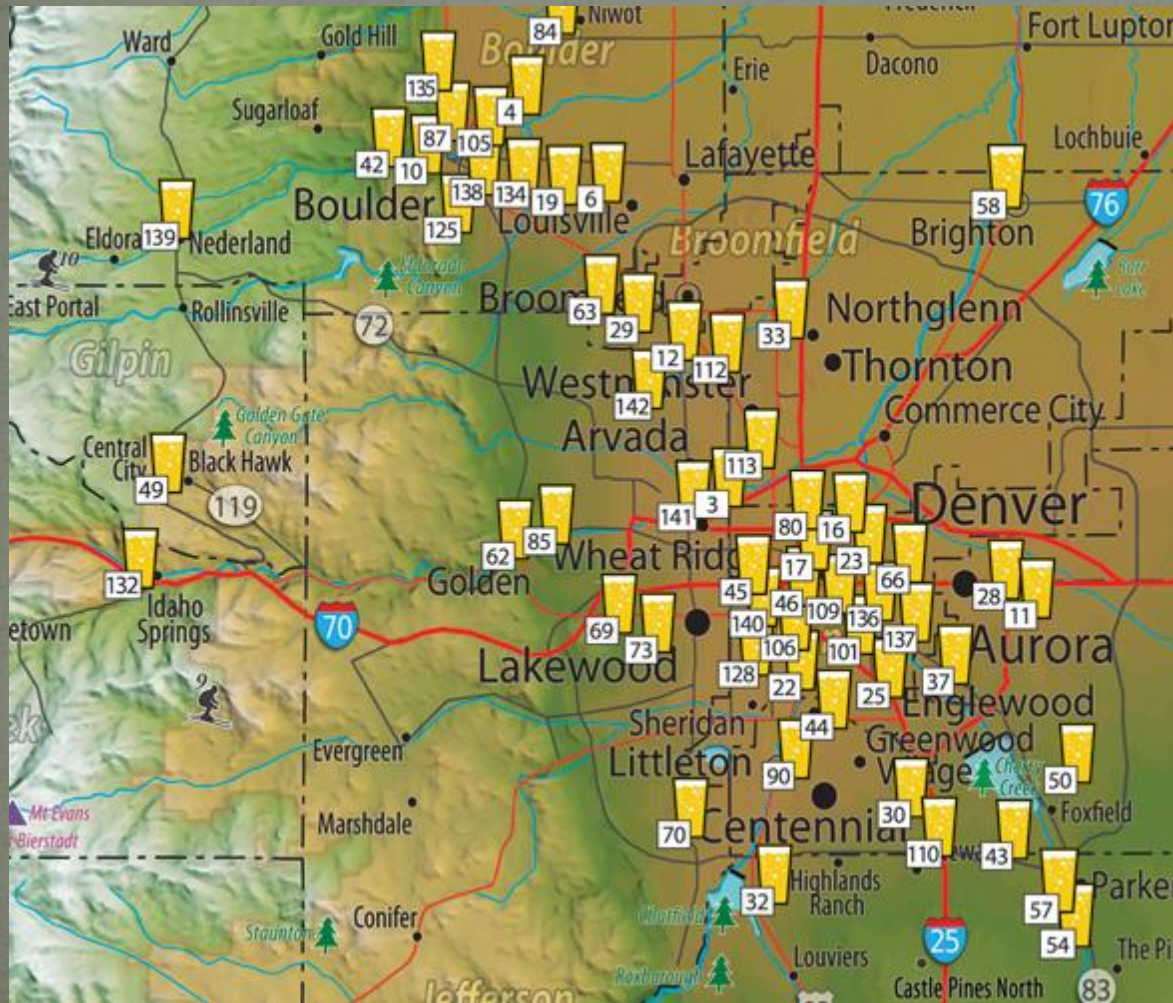


Dryland Wheat

Promising start for
2015 crop!



#1 in U.S. for Beer Brewing



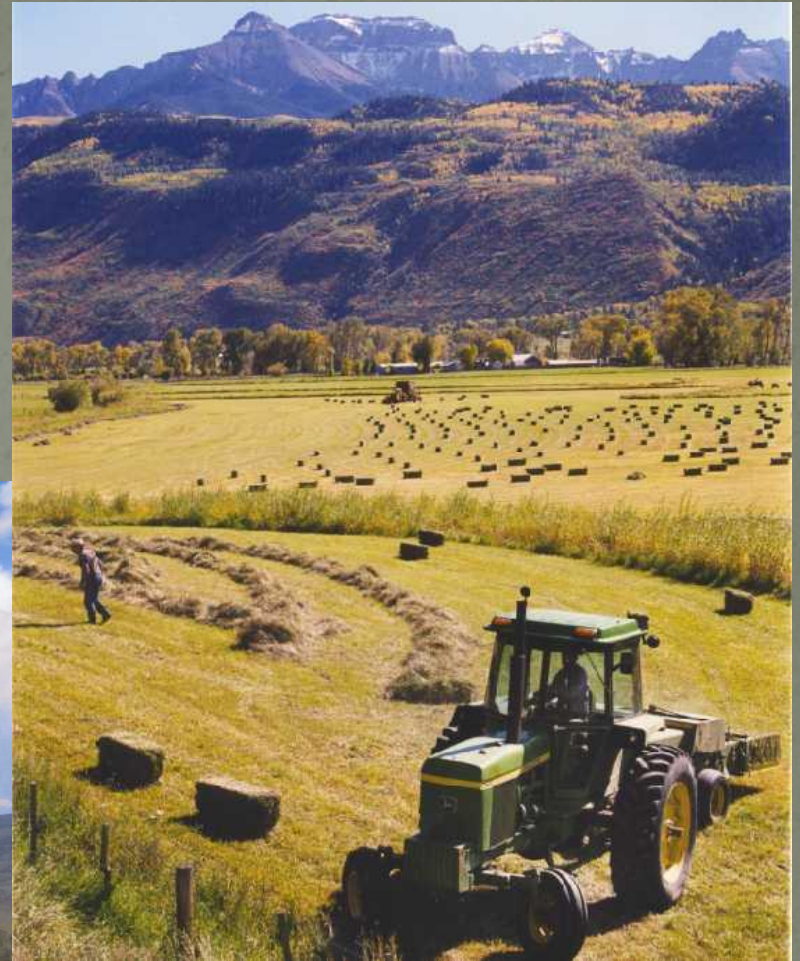
Colorado is an Industry Leader

- ✓ #1 producer of millet and a leading producer of barley, cantaloupe, fresh market potatoes, lettuce, sweet corn, and winter wheat.
- ✓ Milk production per dairy cow is among the highest in the U.S.
- ✓ Leader in the number of cattle and lambs fed, meat processing technology, and animal welfare.
- ✓ CSU's College of Agriculture Sciences is globally recognized.
- ✓ Home to the National Western Stock Show.
- ✓ Colorado is a hub for national agricultural associations.
- ✓ #1 in the U.S. in beer brewing and home to a growing number of wine, craft beer and spirits producers.
- ✓ Recognized as a leader in the advancement of local and organic foods, as well as the fast and fresh restaurant market segment.

Farm to Market-Organic-Orchards



Alfalfa & Grass Hay



2014 Food & Agriculture Industry Stakeholder Survey



Q6) What is the single issue affecting Colorado's food and agriculture industry today that most often keeps you up at night?

Top Responses	# of Responses
Water (availability, loss to municipalities, competition with fracking, drought, climate change, etc.)	48
Increasing government regulation	17
Farm and ranch economy (higher input costs, lower prices, need for new markets, etc.)	15
Consumer and disinterest group activism (animal welfare, anti-GMO, expectation of cheap food, questioning of practices, trying to drive policy, etc.)	13
Labor	6
Lack of support/understanding of agriculture among political leadership at both State and Federal levels	4

Water Makes it Happen.



Planning for a Future with Agriculture

COLORADO'S WATER PLAN

COLLABORATING
ON COLORADO'S
WATER FUTURE

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Growing Food – Growing Partnerships

- Healthy Soil
- Clean Water
- Clean Air
- Healthy Forests
- Well-Managed Wildlife
- Vibrant Rural Communities
- CoLABORation





Questions?

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THANK YOU!



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